

## Plan 2 or Plan 3?

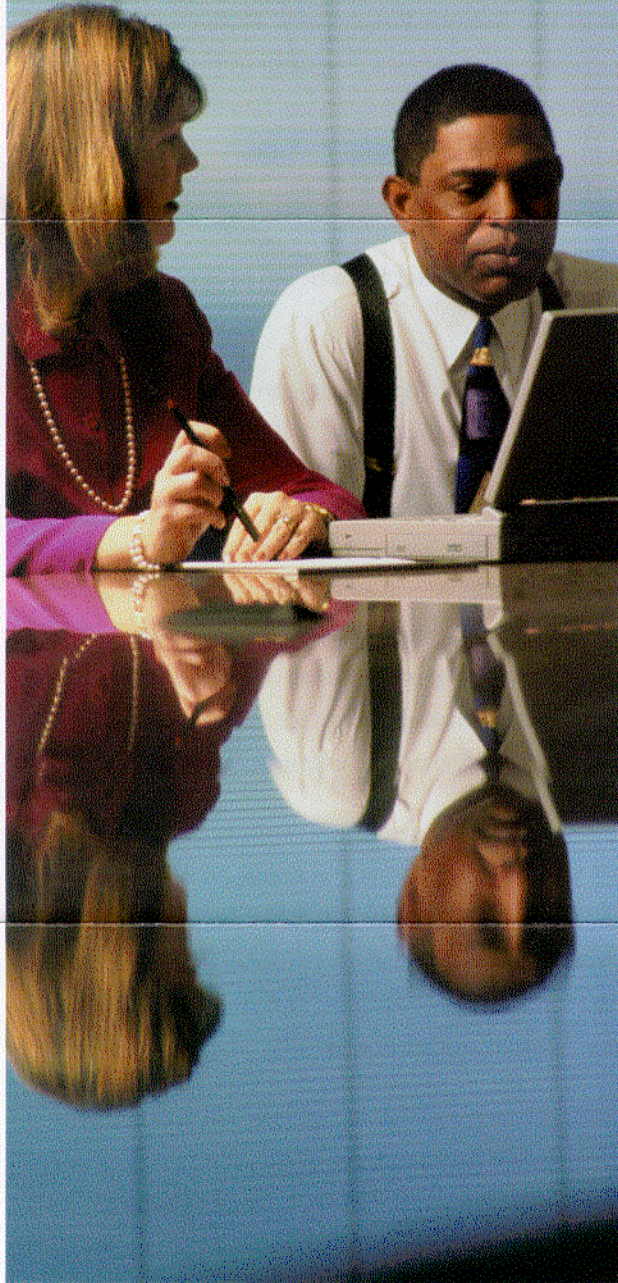
### *Making your Transfer Decision*

The Department of Retirement Systems has contracted with Educational Technologies Inc. (ETI) to inform eligible members about the School Employees' Retirement System (SERS), and to educate them about their option to choose between the two plans (SERS Plan 2 or SERS Plan 3).

The transfer decision education program begins March 31, 2000 and includes:

- A videotape and booklet. These items will help members understand the differences between the two plans. These will be mailed by March 31, 2000. If members haven't received the materials by mid-April, they should contact ETI.
- Transfer modeling software program. Available on ETI's Web site at the end of March, the modeling software will help members compare the two plans as they apply to their individual situations and assumptions.
- Transfer decision workshops. Set-up at school districts throughout the state, the workshops provide further discussion about both plans and the transfer decision factors. Check the Web site or call ETI for a schedule.
- A toll-free support line. Members may call if they have additional questions about their transfer decision.

Contact ETI at 1-800-453-0321  
[www.fin-ed.com/SERS](http://www.fin-ed.com/SERS)







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## SERS Transfer Education Begins

The Department of Retirement Systems (DRS) is pleased to announce the beginning of education activities for future School Employees' Retirement System (SERS) members. Enclosed with this memo are posters that contain an overview of the SERS education programs as well as numbers for members to call if they have questions. **Please place these posters in a prominent area so that members may view this important information.**

- The January issue of the *SERS Newsletter* described the recommended steps of transfer education and provided members with a Transfer Decision Education Checklist. As published in the calendar of events in the *SERS Newsletter*, a Video Bookpack will be mailed to members' home addresses on Friday, March 31.
- Educational Technologies, Inc. (ETI) will contact certain school districts in March and April; other school districts will be contacted this summer. Sign-up sheets for transfer education workshops will be available when ETI contacts school districts.
- ICMA Retirement Corporation (ICMA-RC) will begin contacting school districts in late spring. Sign-up sheets for investment education seminars will be available at school districts in August.

If you need more posters, please call DRS Employer Support Services at (360) 664-7200 or 1-800-547-6657 ext. 47200.

If you have any questions about transfer and/or investment education workshops or seminars, please call Mr. Stephen Wade at 1-800-547-6657 (ext. 47272) or (360) 664-7272. Mr. Wade is the DRS Educational Training and Research Specialist for SERS.